

New Year Financial Goals



Step 1: Identifying Your Financial Goals

Instructions: Envision what financial success looks like for you. It could be a robust savings account, owning a home, or a well-funded retirement. Write down all your goals, both big and small, to create a comprehensive list of what you want to achieve.

- **Goal 1:** _____
- **Goal 2:** _____
- **Goal 3:** _____
- **Goal 4:** _____

Step 2: Prioritizing Your Goals

Instructions: Prioritize your goals by time frame and importance. Consider what can be achieved this year and what will take longer to accomplish. Rank your goals in order of priority.

Highest Priority: _____

Priority: _____

Priority: _____

Priority: _____

Step 3: Creating a Realistic and Actionable Plan

Instructions: For each of your top three priorities, determine the steps you need to take to reach each goal. This may include setting a budget, automating savings, or seeking investment advice. Break down each goal into smaller, manageable tasks.

Goal 1: _____

- **Action Step 1:** _____
- **Action Step 2:** _____
- **Action Step 3:** _____
- **Action Step 4:** _____

Goal 2: _____

- **Action Step 1:** _____
- **Action Step 2:** _____
- **Action Step 3:** _____
- **Action Step 4:** _____

Goal 3: _____

- **Action Step 1:** _____
- **Action Step 2:** _____
- **Action Step 3:** _____
- **Action Step 4:** _____

Goal 4: _____

- **Action Step 1:** _____
- **Action Step 2:** _____
- **Action Step 3:** _____
- **Action Step 4:** _____

Step 4: Tracking Your Progress

Instructions: Use this section to regularly track your progress. Note the achievements and any adjustments needed. Remember to celebrate your successes and stay flexible to overcome unexpected challenges.

- **Date:** _____ **Goal:** _____ **Progress/Achievements:** _____
- **Date:** _____ **Goal:** _____ **Progress/Achievements:** _____
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Contact Information

For Further Inquiries

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